

# Collaborative Leadership



## Learning Outcomes

1. Build group trust and set program expectations
2. Define effective leadership
3. Understand leadership styles and when to use them
4. Understand what roles different leadership levels should be playing in

# Introduction

## Team Building

**Prompt:** What is something this team might not know about you?

## Expectations: What the Program is, What it is Not

**Prompt:** What do you hope to achieve after completing this program?

**Prompt:** What do you expect from yourself? What do you expect from others?

## Effective Leadership

**Prompt:** How would you describe a great leader?

# Styles of Leadership

Many managers mistakenly assume that leadership style is a function of personality rather than a strategic choice. Instead of choosing the one style that suits their temperament, they should ask which style best addresses the demands of a particular situation.

Research has shown that the most successful leaders have strengths in the following emotional intelligence competencies:

- self-awareness
- self-regulation
- motivation
- empathy
- social skill

There are six basic styles of leadership; each makes use of the key components of emotional intelligence in different combinations.

The **best leaders** don't know just one style of leadership—they're skilled at several and **have the flexibility to switch between styles as the circumstances dictate.**

## Management Styles

The most effective leaders use a broad range of styles, adapting readily to the needs of particular situations and accurately choosing the right style for the moment.

					
<b>Director</b>	<b>Visionary</b>	<b>Friend</b>	<b>Collaborator</b>	<b>Pacesetter</b>	<b>Coach</b>
Immediate compliance from employees	Provide long-term direction and vision	Create harmony between employees	Build commitment and consensus among employees	Accomplish tasks with a high standard of excellence	Long-term professional development of employees

# The Six Management Styles

## DIRECTOR Overview

*Primary Objective: immediate compliance from employees*

- Think of a military general
- The “do it the way I tell you” manager
- Closely controls employees
- Motivates by strong direction

### Effective When

- ✓ There is a crisis/critically short deadline
- ✓ Compliance requires something be done a specific way
- ✓ When deviations are risky

### Least Effective When

- ✗ Employees are underdeveloped – little learning happens with this style
- ✗ Employees are highly skilled – they become frustrated and resentful at the micromanaging

## VISIONARY Overview

*Primary Objective: provide long-term direction and vision for employees*

- The “future-focused” manager
- Skilled at sharing high level vision
- Motivates by inspiring team through mission and vision
- Can sell people on ideas

### Effective When

- ✓ Not everyone is onboard
- ✓ Team is fragmented
- ✓ Team is experienced but in silos
- ✓ The leader is credible

### Least Effective When

- ✗ Specific tactical direction is needed
- ✗ The leader is not credible – people won’t follow your vision if they don’t believe in it
- ✗ The leader has less experience than the team they’re leading
- ✗ Employees are underdeveloped – they need guidance on what to do

## FRIEND Overview

*Primary Objective: create harmony among employees/ between managers and employees*

- Leads with empathy
- The “people first, task second” manager
- Avoids conflict and emphasizes good personal relationships among employees
- Motivates by trying to keep people happy

### Effective When

- ✓ Used with other styles
- ✓ Tasks are routine, performance is adequate
- ✓ Counseling, helping
- ✓ Supporting others in conflict
- ✓ The leader is new (they need to build relationships)

### Least Effective When

- ✗ Performance is inadequate – affiliation does not emphasize performance
- ✗ There are crisis situations needing direction
- ✗ Not equally used with all employees

## COLLABORATOR Overview

*Primary Objective: build commitment and consensus among employees*

- The “everyone has input” manager
- Encourages employee input in decision making
- Motivates by rewarding team effort

### Effective When

- ✓ Uncharted territory
- ✓ Employees work together
- ✓ Staff has experience and credibility but lack confidence
- ✓ Steady working environment

### Least Effective When

- ✗ Employees must be coordinated
- ✗ There is a crisis – no time for meetings
- ✗ There is a lack of competency – close supervision required

## PACESETTER

*Primary Objective: accomplish tasks to a high standard of excellence*

### Overview

- The “do it myself” manager
- Performs many tasks personally and expects employees to follow his/her example
- Motivates by setting high standards and expects self-direction from employees

#### Effective When

- ✓ People are highly motivated
- ✓ Little direction/coordination required
- ✓ Managing experts
- ✓ Growing trust and credibility – wouldn’t ask you to do anything they couldn’t

#### Least Effective When

- ✗ Workload requires assistance from others
- ✗ Development, coaching & coordination are required
- ✗ Trying to build a culture of collaboration

## COACH

*Primary Objective: long-term professional development of employees*

### Overview

- The “developmental” manager
- Helps and encourages employees to develop strengths and improve performance
- Motivates by providing opportunities for professional development

#### Effective When

- ✓ Skill needs to be developed
- ✓ Employees are motivated and want development
- ✓ Ongoing mentorship and encouragement
- ✓ Helping people find passions

#### Least Effective When

- ✗ People don’t want to learn
- ✗ There is a crisis
- ✗ The leader lacks expertise
- ✗ Employee does not fit in the role
- ✗ Performance discrepancy is great – coaches may not let go of a poor performer

## Your Leadership Style

### Style I Use Most

- DIRECTOR
- VISIONARY
- FRIEND
- COLLABORATOR
- PACESETTER
- COACH

### Style I Want to Develop

- DIRECTOR
- VISIONARY
- FRIEND
- COLLABORATOR
- PACESETTER
- COACH

# Developing Each Style

## DIRECTOR

### 1) **Get to know the work**

Know the jobs better than the people who have those jobs or the people who are carrying out the work you are trying to influence. Your judgment about the work in question must take precedence over that of others.

### 2) **Give direct orders**

You want to be clear and precise—this is not the time to waffle.

### 3) **Be decisive**

You are the decision maker, the person in charge, so you need to communicate what you want both verbally and nonverbally.

### 4) **Set clear standards of performance**

You want people to know exactly what you expect from them.

### 5) **Monitor employees closely**

Keep on top of what's going on. Establish procedures that will provide you with the information you need to assess each person's level of activity and the results of that activity.

### 6) **Clearly point out deviation from rules**

Point out to people what behavior does not meet your standards. Insist on adherence to the rules of your organization.

## VISIONARY

### 1) **Formulate your vision, strategy, and objectives**

Create a clear vision, a strategy for achieving that vision, and objectives to measure when that vision has been reached.

### 2) **Prepare and give your “vision speech”**

Communicate your vision, strategy, and objectives often to your team. You can never give this speech often enough. Create your speech so that it: centers on a great cause (opportunity or threat); has relevance to the audience; and shows confidence that the vision can be achieved.

### 3) **Solicit input**

Ask your team for their ideas, thoughts, feelings, and concerns about anything related to the goals and functions of the organization.

**4) Provide rationale**

Explain the “whys” associated with your decisions or actions. Where possible, try to link these to the larger goals and objectives of the organization.

**5) Delegate responsibility clearly**

Your job is to persuade and influence others to do their best. It is not about doing the work yourself.

**6) Provide feedback**

Let each person know when you feel they are doing well, or when they are not doing well. Be specific about the behavior you see. Give feedback on a regular, ongoing basis.

**7) Reward and punish fairly**

State policies firmly. Do not discriminate. Advance on merit only.

**FRIEND****1) Identify and act to resolve interpersonal conflict**

Recognize the positive traits of people and accept them for who they are. Encourage everyone to do the same and work together in harmony.

**2) Sympathize with others**

Take time to understand and express compassion for how people feel. Commiserate with your team when things are not going well for them.

**3) Accommodate personal needs**

Avoid putting the goals of the organization before the welfare of your people.

**4) Trust your people to perform**

Trust that your team will perform well if they are treated well. If you care about them, they will reward you with loyalty and performance.

**5) Initiate personal contacts with your team**

Whenever possible, travel with them, invite them to dinner, or have lunch in shared company spaces.

**6) Provide social activities**

Consider holding group activities: holiday parties, summer picnics, birthday and anniversary parties, group sports (softball, volleyball), group outings (theatre, movies).

**7) Personal recognition**

Recognize individual birthdays and anniversaries; provide congratulations for weddings, birth of babies, etc.

## COLLABORATOR

### 1) **Hold information sharing meetings**

Keep everyone informed about organizational issues affecting them by holding frequent meetings to share information and ideas.

### 2) **Conduct participative meetings**

This style of meeting requires excellent meeting management skills. You will need the ability to create a detailed agenda, manage time, draw out reticent people, hold back dominant participants, listen, and remain patient and in control of your own feelings and behavior.

### 3) **Share decision making with others**

Ask your team to participate in making major decisions with you. They will need all necessary information surrounding the issues at hand.

### 4) **Seek consensus**

Avoid taking action or making a decision until everyone has been heard and can agree to support it as the best course of action given the circumstances.

### 5) **Recognize good performance**

Encourage high performance by giving your team positive feedback and rewarding their more productive efforts.

## PACESETTER

### 1) **Maintain your “expert” professional/technical knowledge and skills**

You must be credible as an expert in whatever you do.

### 2) **Teach by example**

Model the behavior you want to see in your team. If you are looking for long hours, then you need to be the first to arrive in the morning and the last to leave at night; if it's hard work you're after, then take up that call.

### 3) **Insist on excellence**

Try to find work for people in which they will excel. If a person can't be successful in a particular assignment, change it.

### 4) **Delegate low-to-moderate risk tasks**

Delegate tasks that you are fairly certain the person can handle well. If the outcomes are critical, try to have an experienced person as backup.

## 5) **Emphasize results**

Let your team know that they won't get any interference from you as long as they're getting the results you are looking for. However, if they need help, show how willing you are to step in with advice or assistance.

## COACH

### 1) **Create development goals with employees**

Have a candid conversation with your direct reports about their long-term aspirations. Discuss the likelihood of those aspirations being met by the company.

### 2) **Identify employee strengths and weaknesses**

Take the time to help employees think through their strengths and areas of development. Give your perspective on how their strengths and weaknesses may enhance or block achieving their aspirations. This discussion will help them assess the appropriateness of their goals and aspirations.

### 3) **Support the development plan**

Determine how you will support the employee's development plan. Be clear on the kind of support you can offer and the role you and the employee will play in carrying out the plan.

### 4) **Seek growth opportunities for your employees**

Try to find or create opportunities to enhance the professional development of your employees. This could include the appropriate marketing of your staff's capabilities, both inside and outside your own organization.

### 5) **Encourage improvement**

Periodically review the progress of each of your employees and advise on any adjustments to their plans that are necessary or appropriate.

Adapted From:

Leadership That Gets Results by Daniel Goleman Harvard Business Review  
The Hay Group [www.haygroup.com](http://www.haygroup.com)

# Leadership Pipeline

Leadership Level	Skills Needed	Spends Time On	Work Priorities
<b>Setting the Vision</b>	<ul style="list-style-type: none"> <li>Foresight &amp; insight from past experience</li> <li>Oversight</li> <li>Consensus building</li> </ul>	<ul style="list-style-type: none"> <li>Resource allocation</li> <li>Planning for the future</li> </ul>	<ul style="list-style-type: none"> <li>Integrity and public image</li> <li>Forward progress</li> </ul>
<b>Leading the Organization</b>	<ul style="list-style-type: none"> <li>Strategic thinking</li> <li>Financial competency</li> <li>Driving growth &amp; relevance</li> </ul>	<ul style="list-style-type: none"> <li>Being visible</li> <li>Reflection &amp; analysis</li> <li>Delegating tactical work</li> </ul>	<ul style="list-style-type: none"> <li>Achievement of vision</li> <li>Performance of the organization</li> </ul>
<b>Leading a Department</b>	<ul style="list-style-type: none"> <li>Listening and interpreting information</li> <li>Execution of strategy</li> <li>Delegation and trust</li> <li>Dealing with unknowns</li> </ul>	<ul style="list-style-type: none"> <li>Communicating up, down and across depts.</li> <li>Leading through KPIs</li> <li>Participating in meetings</li> </ul>	<ul style="list-style-type: none"> <li>Relationship building with department leads</li> <li>Collective performance</li> </ul>
<b>Leading Managers</b>	<ul style="list-style-type: none"> <li>Developing leaders</li> <li>Managing boundaries</li> <li>Holding others accountable</li> </ul>	<ul style="list-style-type: none"> <li>Team planning and resourcing</li> <li>Supporting managers</li> <li>Developing leaders</li> </ul>	<ul style="list-style-type: none"> <li>Results through teams</li> <li>Motivating others</li> </ul>
<b>Leading Others</b>	<ul style="list-style-type: none"> <li>Prioritization</li> <li>Communication</li> <li>Coaching &amp; feedback</li> </ul>	<ul style="list-style-type: none"> <li>Planning work</li> <li>Making time for staff</li> <li>Managing performance</li> <li>Developing others</li> </ul>	<ul style="list-style-type: none"> <li>Results through individuals</li> <li>Success of direct reports</li> <li>Performance as a leader</li> </ul>
<b>Leading Self</b>	<ul style="list-style-type: none"> <li>Technical proficiency</li> <li>Professionalism</li> </ul>	<ul style="list-style-type: none"> <li>Managing own time</li> <li>Work product</li> </ul>	<ul style="list-style-type: none"> <li>Results through individual contribution</li> <li>Acceptance of culture, professional standards</li> </ul>

Adapted From: "The Leadership Pipeline" by Ram Charan, Stephen Drotter, and James Noel.

# Notes

## Continued Learning: Collaborative Leadership

Online Resource: Collaboration White Papers <https://www.collaboration-llc.com/white-papers>

Article: *How Emotional Intelligence Became a Key Leadership Skill*, Andrea Ovans Harvard Business Review

Book: *Me-To-We: The Shift Every Business Leader Must Make for Lasting Success* by Michael Gunther

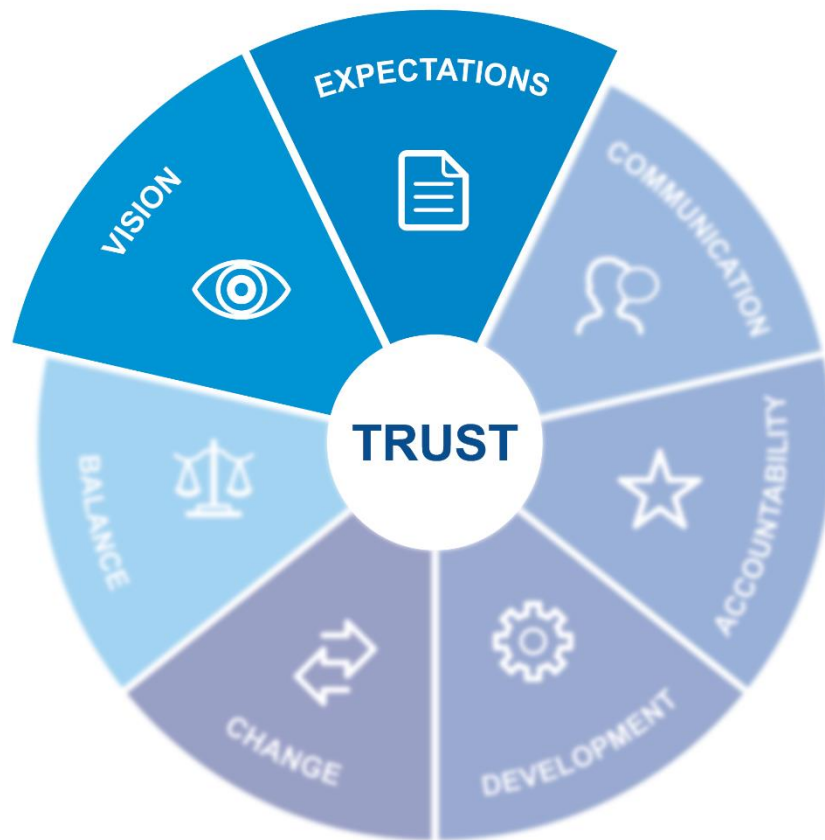
Book: *Emotional Intelligence: Why It Can Matter More Than IQ* by Daniel Goleman

Book: *Working with Emotional Intelligence* by Daniel Goleman

Article: *The Focused Leader*, Daniel Goleman Harvard Business Review

Book: *The Leadership Pipeline: How to Build the Leadership Powered Company* by Ram Charan and Stephen Drotter

# Vision & Expectations



## Learning Outcomes

1. Understand the role of the mission, vision and core values in organizational success
2. Learn how to effectively set and communicate expectations
3. Understand how to use the freedom scale to improve delegation
4. Recognize the importance of KPIs and learn how to leverage them

# Prework

## Mission & Core Values

### 1) Review your organization's mission

Your mission statement should state the organization's "why" and serve as the foundation for your vision.

### 2) Review your organization's values

Core Values are the HOW to your organization's why. They are the guiding principles for your employees and serve as the foundation for feedback, empowering employees to make decisions that will grow themselves and the organization.

### 3) Think about how to embed your mission & core values

Studies show that values must be internalized by employees and integrated into the culture for them to have a meaningful impact. Some ways to embed them include:

- Distribute a copy of your core values to every employee
- Create printouts that highlight each value and hang them around your office
- Add your values to your website
- Reference your values in meetings; they need to become part of how everyone behaves and makes decisions
- Reward, recognize, and celebrate employees and teams that exemplify the company's values
- Make sure you and your leadership are modeling behavior based on your values. If not, your values will lose their power and will not stick

## Vision

### 4) Review any vision documents

An organization's vision should describe what it hopes to achieve in the future. Examples of vision documents include:

- Vision Statement
- Strategic Plan

### 5) Respond: Vision impact

After reviewing any documents your organization has, how do they apply to you? How do they impact you and your team?

# Expectations

## Setting Clear Expectations Activity

**Use the space below to draw a tree** *(please do not read ahead)*

## Scoring

Now, score your drawing giving one point for each thing you included in your drawing:

- Small (in relation to the paper)
- Firm, strong lines
- Tree in the top half of the paper
- Lots of big leaves
- Trunk should be shaded
- Deep roots
- Drawn on a hill
- All branches should be pointing up
- At least one feature that is not attached to the tree, extra points for each additional feature (*grass, flower, bird, fruit basket*)

## Reflection Questions

1. **How does it feel to not be given this detail ahead of time? What happens when there aren't clear expectations?**
  
  
  
  
  
  
  
  
  
  
2. **How can this example be applied to setting expectations as a leader?**
  
  
  
  
  
  
  
  
  
  
3. **What is something you want to change about how you set expectations?**



# Communicating Expectations

## The Four Cs Method

1. **Context** – Defining overall purpose and how it fits into the broader vision
2. **Clarity** – Setting clear, measurable outcomes
3. **Conditions** – Explain level of autonomy, planned touchpoints and decision making ability
4. **Commitment** – Involve them in the discussion of the first 3 Cs to ensure buy-in

**Prompt:** How would you use these four Cs to effectively explain the Tree activity?

## Methods of Communication

### Written Communication (emails, texts, etc.)

- Task management throughout project
- Quick questions/easy decisions
- Follow-up after a meeting
- Tracking performance issues
- Messages with minimal emotional impact
- Messages that need to be delivered quickly to a large group

### Verbal Communication (calls, meetings, etc.)

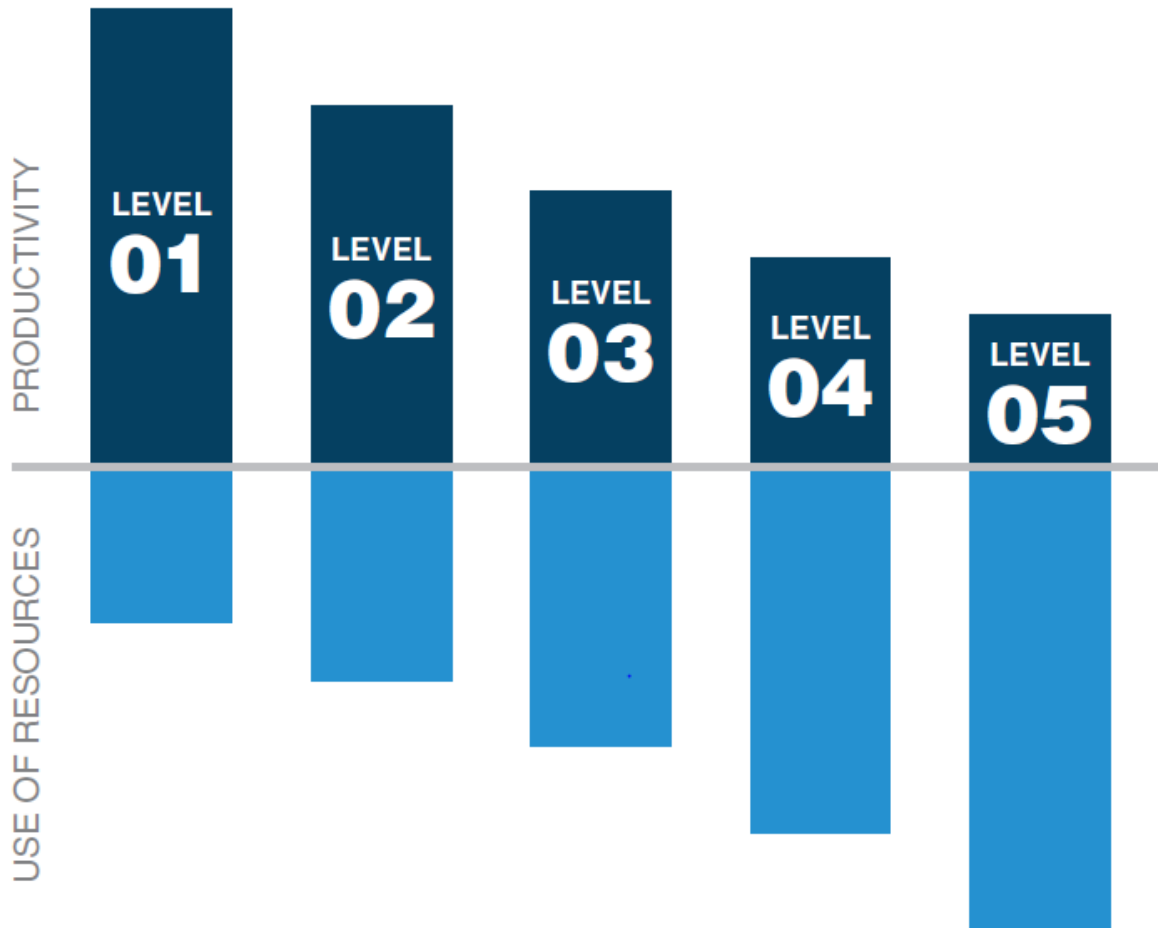
- First discussion of expectations
- Goal setting
- Complex decisions
- Performance issues
- Requesting feedback
- Messages with high emotional impact

*P.S. Don't Forget to Consider Non-Verbal Communication....*



# Freedom Scale

Effective managers know how to find and acquire top talent to build effective teams. Leveraging human productivity means getting the most out of your people without burning them out. The Freedom Scale is a tool that quantifies levels of delegation. The key to managing this is to know where each person stands on this index and to manage them accordingly.



- LEVEL **01** Highest Autonomy: Act, routine reporting only
- LEVEL **02** High Autonomy: Act, then advise at once
- LEVEL **03** Moderate Autonomy: Recommend, then act
- LEVEL **04** Little Autonomy: Ask what to do
- LEVEL **05** No Autonomy: Wait until told

# Effective Delegation Checklist

Delegation can be a powerful leadership and coaching tool. **Effective** delegation involves six basic steps:

## Prepare in advance

- Take time to think through the task
- Define the outcome you want

## Discuss the task to be delegated

- Use good communication skills to state expectations
- Be clear and check for understanding

## Identify the deadline for completion

- Make sure your deadline is realistic and achievable
- Build in revision time

## Outline the level of authority

- Define which freedom scale level they should operate from (wait until told, act and report, etc.)

## Build in checkpoints or progress reports

- Set meetings early and close together at first, then taper off as they begin to master the task
- In the meetings, include:
  - ✓ A review of work
  - ✓ Identification of what needs to be done differently
  - ✓ Employee feedback on the task
  - ✓ Encouragement
  - ✓ Setting the next checkpoint

## Conduct a final debriefing

- A **two-way** discussion that includes:
  - ✓ Reinforcing growth that has occurred
  - ✓ Outlining areas for additional growth
  - ✓ Applauding success
  - ✓ Documenting performance problems
  - ✓ Providing real coaching

# Measuring Success

## Key Performance Indicators

A key performance indicator (KPI) is a quantifiable measure used to evaluate the success of an organization, employee, etc. in meeting performance goals.

### Why are KPIs important?

KPIs help leaders to focus on common goals and ensure the organization works in alignment with them. They also function as a performance gauge that all team members can use to assess performance and managers can use for accountability.

### Example KPIs

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#### *Financial*

- Revenue
- Gross Profit

#### *Operations/Production*

- Inventory turnover
- Utilization

#### *Business Development*

- Close ratio
- Click-through rate (email)

#### *Management/HR*

- Absenteeism
  - Turnover
- 

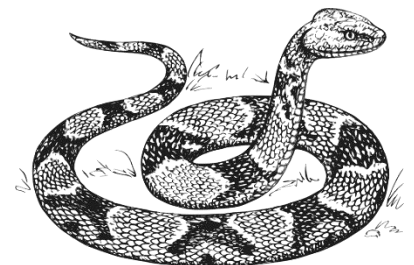
### Tracking KPIs

The most important component in making KPIs useful is having a simple tracking tool that is routinely updated and reviewed.

Common pitfalls when trying to capture KPIs include:

- ✗ Not being consistent in reviewing KPIs with your team
- ✗ Having too much information to measure or making it too complicated
- ✗ Measuring actions instead of results
- ✗ Holding some accountable to results but not others
- ✗ Inadvertently tying negative behavior to an incentive

The **cobra effect** occurs when an attempted solution to a problem makes the problem worse.



# Notes

## Continued Learning: Vision & Expectations

Collaboration White Papers: <https://www.collaboration-llc.com/white-papers>

Book: *Start with Why: How Great Leaders Inspire Everyone to Take Action* by Simon Sinek

Book (Expectations & Management): *First, Break All The Rules: What the World's Greatest Managers Do Differently* by Jim Harter and Marcus Buckingham

Book (Delegation): *The New One Minute Manager* by Ken Blanchard and Spencer Johnson M.D.

Article: *Letting Go* by Timothy W. Furstahl

Article: *Setting Expectations Using the 4 C's Framework* by David Town from Virtual Leadership Matters

# Communication



## Learning Outcomes

1. Understand how perceptions impact communication
2. Determine how to work with others who have different communication styles
3. Recognize common barriers in communication
4. Understand the components of effective feedback

# Prework

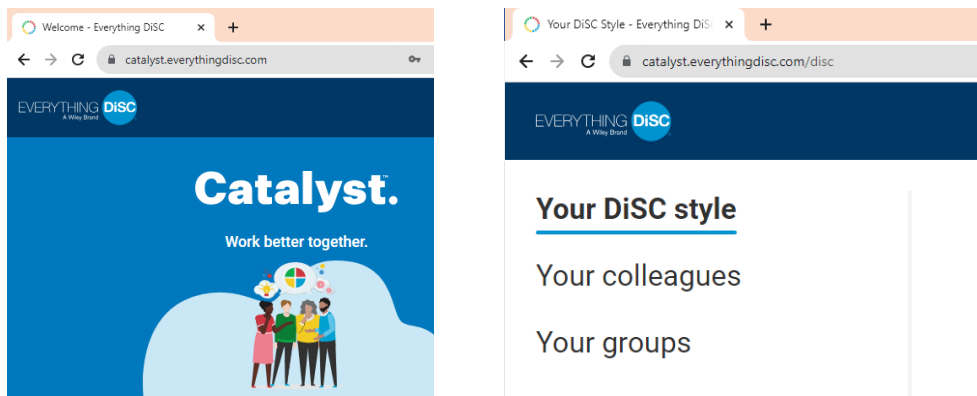
## DiSC

### 1) Complete the DiSC assessment

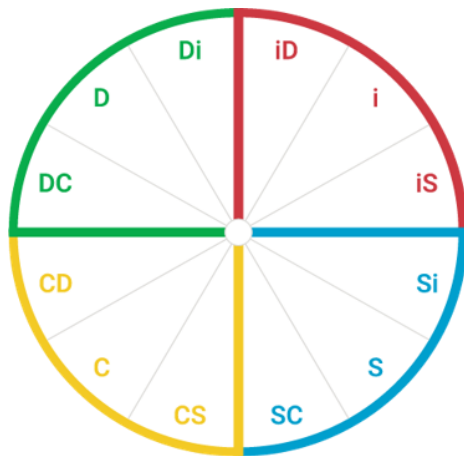
If you haven't already completed one, Collaboration will send you an invite for the assessment. If you have any questions about this process, reach out to the Collaboration Team.

### 2) Review your profile on catalyst

Go to the Catalyst website (<https://catalyst.everythingdisc.com/>) and review your profile on the "Your DiSC Style" tab

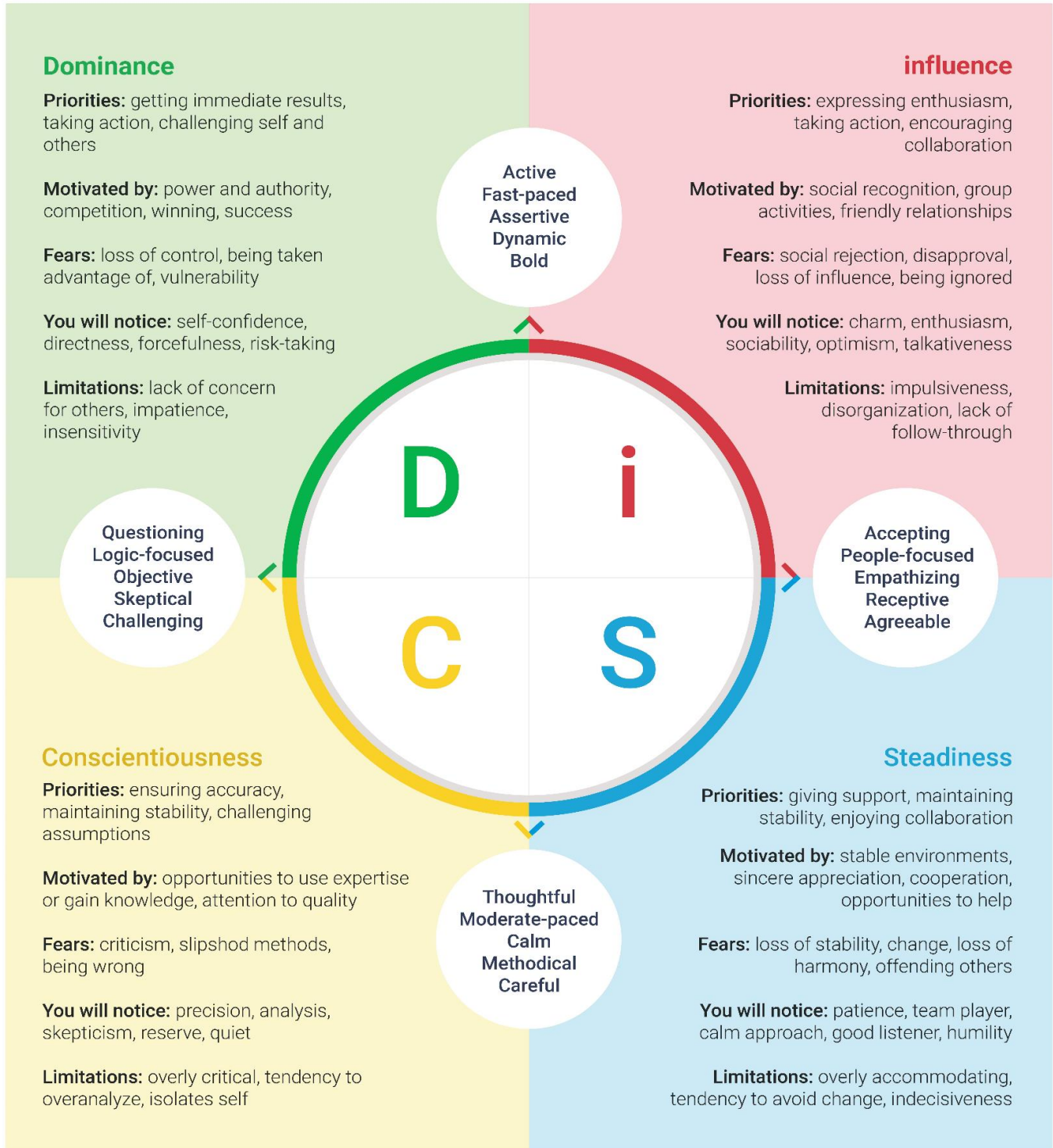


### 3) Circle your DiSC style



### 4) Write three things you resonated with from your DiSC style description

# Communication Styles



Source: Everything DiSC®

## Perceptions in Communication

Being able to recognize how you may be perceived, as well as how you perceive others through your own lens, enables you to put language to those perceptions. Then, you can use that awareness to adjust your communication style to minimize misunderstandings and maximize the productivity and effectiveness of working relationships.

### Dominance

As a D style, you likely view \_\_\_\_\_ as:

(D)ominance	(I)nfluence	(S)teadiness	(C)onscientiousness
Understandable	Talkative	Friendly	Factual
Practical	Fun	Patient	Logical
Straight forward	Energetic	Private	Private
Authentic	Sociable	Introverted	Introverted
Authoritative	Overly emotional	Slow paced	Slow to make decisions
Forceful	Self-centered	Non-committal	Lack vision
A threat to my authority	Non-committal	Slow to speak up	Overly critical
Unreasonable	Impractical	Too sensitive	Too serious

### Influence

As an i style, you likely view \_\_\_\_\_ as:

(D)ominance	(I)nfluence	(S)teadiness	(C)onscientiousness
Movers and shakers	Fun	Kind	Detailed
Straightforward	Engaging	Intuitive	Logical
Powerful	Creative	Gentle	Dependable
Logical	Visionary	Thoughtful	Analytical
Overly practical	Egocentric	Slow placed	Uncooperative
Insensitive	Overly talkative	Introverted	Critical
Authoritative	Exhausting	Too sensitive	Impersonal
Boring	Emotional	Slow to speak up	Withholding

## Steadiness

As a **S** style, you likely view \_\_\_\_ as:

(D)ominance	(I)nfluence	(S)teadiness	(C)onscientiousness
Move things forward	Brings energy to team	Kind	Logical
Good in crisis	Intuitive	Gentle	Detailed
Powerful	Fun	Thoughtful	Dependable
Practical	Energetic	Practical	Intuitive
Insensitive	Egocentric	Slow paced	Critical
Authoritative	Poor listener	Overly concerned	Insensitive
Poor listener	Scattered	Unorganized	Impersonal
Too fast to make decisions	Illogical	Too sensitive	Unsocial

## Conscientiousness

As a **C** style, you likely view \_\_\_\_ as:

(D)ominance	(I)nfluence	(S)teadiness	(C)onscientiousness
Influential	Visionary	Good listeners	Appreciate logic
Visionary	Engaging	Thoughtful	Systematic
Forceful	Social	Patient	Careful
Decisive	Fun	Kind	Realistic
Demanding	Irrational	Give too much of themselves	Too Practical
Quick to make decisions	Self-centered	Too sensitive	Critical
Doesn't learn from mistakes	Over emotional	Follower	Impersonal
Poor listener	Non-committal	Too private	Unsocial

**Prompt:** Do any of these perceptions particularly resonate with you?

## Barriers to Communication

Leaders can inadvertently discourage communication through verbal and non-verbal reactions. Research has shown that the following barriers to communication are the most common in the workplace today.

**Think back in the past 30 days.....**

- circle items you have experienced*
- star items you have done personally*

1. Selectivity hearing only what we expect to hear
2. Ignoring information that conflicts with what we already “know”
3. Being skeptical of the source of information
4. Having differing perceptions
5. Using words that mean different things to different people
6. Getting emotional about what is being said
7. Using inconsistent non-verbal signals
8. Being distracted
9. Giving too much information at once
10. Thinking about something else
11. Hearing “just the facts”, no feelings
12. Being too busy, multitasking

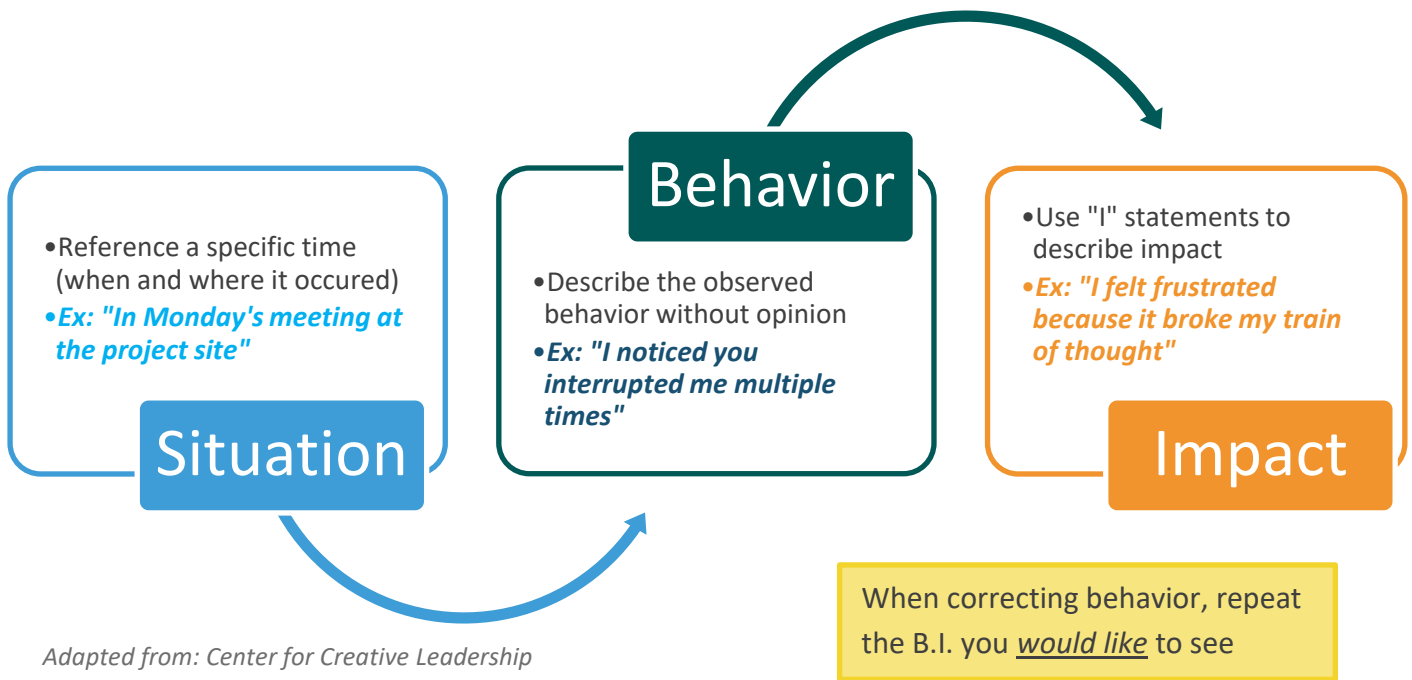
### Best Practices to Remove Barriers

- ✓ Listen for something new – ask “what can I learn in this conversation?”
- ✓ Assume good intent
- ✓ Summarize what you hear
- ✓ Ask clarifying questions
- ✓ Share if you feel emotionally clouded and need to revisit a conversation
- ✓ Be mindful of non-verbal communication
- ✓ Schedule important conversations
- ✓ Check for understanding when giving information - “Can you reiterate what I said?”
- ✓ Ask for their best communication method (verbal, writing, etc.)
- ✓ Put away distractions (phone, laptop, etc.) as much as possible during conversation

# Feedback

## Situation-Behavior-Impact (SBI)™ Feedback Model

When giving feedback, it is important to prepare for the conversation. Being intentional about the delivery of feedback is a key component in effectively addressing the issues at hand and working towards solutions for the future.



*Adapted from: Center for Creative Leadership*

## Practicing the SBI Feedback Model

Now, let's get in pairs and practice giving feedback in this model:

**Prompt:** How did it feel using the SBI model?

**Prompt:** How would you respond if your employee were to react (crying, anger, etc.) during the conversation?

## Responding to Emotion During Feedback

Feedback sessions can be difficult for both the leader giving feedback and the employee receiving it. Here are some tactics to help you effectively respond to common emotions that come up during feedback.

### Anger

- Remain composed and avoid responding back with anger
- Verbalize what you see and remain solution oriented
- Set boundaries around inappropriate behavior (*yelling, name calling, etc.*)

*“I can tell that you are angry, and that’s okay. My intent is \_\_\_ and I would like to do \_\_\_ to move forward. How do you feel about committing to that plan?”*

### Crying

- Offer tissues and allow them a moment to calm down
- Express understanding without pressuring them to stop crying immediately
- If the crying persists, consider finding a different time or method for the conversation to ensure the feedback can be received in a clear-minded state

*“I can tell this is a difficult subject for you to discuss. Take a moment and let me know when you’re ready to continue the conversation.”*

### Defensiveness

- Name the defensiveness and normalize feedback being difficult for many people
- Ask questions about their experience during feedback
- Describe what is needed going forward

*“I’ve noticed when I give you feedback, you often seem focused on why it’s not needed. Can you tell me about what’s going on for you when I give you feedback?”*

**Prompt:** Can you recall a time you received feedback and felt any of the above emotions? What was that experience like for you?

# Notes

## Continued Learning: Communication

Tool: DiSC <https://www.everythingdisc.com/>

Book: Giving Effective Feedback (HBR 20-Minute Manager Series) by Harvard Business Review

Book: The Feedback Imperative: How to Give Every day Feedback to Speed Up Your Team's Success by Anna Carroll

Article: Giving a High Performer Productive Feedback by Amy Gall

Article: How to Give Feedback People Can Actually Use by Jennifer Porter

Article: How to Give Feedback to People Who Cry, Yell or Get Defensive by Amy Jen Su Harvard Business Review

Article: How to Use Situation-Behavior-Impact (SBI)<sup>™</sup> to Explore Intent vs. Impact by Center of Creative Leadership

# Accountability



## Learning Outcomes

1. Define accountability
2. Understand the key components of high performance teams
3. Identify performance issues and determine how to address them
4. Improve ability to lead difficult conversations

# Prework

## 1) In your own words, what is accountability?

## 2) Rate the following practices (1=least effective, 10=most effective)

- \_\_\_ Assessing team members' competency level on a task before delegating work
- \_\_\_ Quoting "My mama says that stupid is as stupid does" to poor performers
- \_\_\_ Regular performance reviews
- \_\_\_ Ignoring employees and taking a shot of tequila when issues arise
- \_\_\_ Asking "What's preventing you from getting this done?" when a deadline is missed
- \_\_\_ Publicly shaming employees
- \_\_\_ When employees ask for support, saying "I don't care how, just get it done"

## 3) Review feedback tendencies by style

Feedback and the DiSC® Styles		
	How Each Style Gives Feedback	How to Give Them Feedback
D	Tends to be direct and matter-of-fact, even with sensitive topics.	Be direct and firm, but not controlling. Emphasize how their behavior is affecting results.
i	Glosses over problems and redirects conversation toward the positive. May lash out when upset.	Retain an optimistic tone, but underscore the seriousness of the problem. Acknowledge their emotions.
S	Avoids hurting feelings at all costs and downplays the severity of problems.	Be concrete but gentle. Offer them reassurance that you're not upset since they may be too hard on themselves.
C	Tends to be objective and factual, perhaps even cold. Avoids potentially emotional topics and problems.	Give specific examples of past behavior and consequences. Keep the conversation logical and objective.

## Successful Management

Capability, responsibility, and accountability are three key components to management and they are mutually inclusive. That means, it is impossible to enforce one without the others, yet many leaders fail by only focusing on accountability.

**Requiring Results (Expectations), Rewarding Success (Recognition),  
Mending Mistakes, Punishing Misconduct (Discipline)**



**Delegating, Access to Resources, Authority  
(Freedom Scale), Self-initiation**

**Hiring, Training, Development**

Source: Accountability: Prerequisites Required  
By Scott Bieber, Masters of Public Administration  
FBI Training Division, Law Enforcement Bulletin

## Creating High Performance Teams

When people think of accountability, many picture difficult conversations to *address* performance issues. Thankfully, accountability doesn't always have to be so uncomfortable. The following are four key measures that help *create* high performance on the front end.

### Establish Common Purpose

- Define your mission & core values and use them frequently
- Create a strategic plan and get buy in on team members' roles
- Tie performance conversations and goal setting back to your mission, core values and strategic plan

### Set Expectations

- Have clearly defined, annually revised job descriptions
- Clarify decision making authority and freedom scale level
- Focus on coaching through mistakes versus fixing them yourself to clarify expectations

### Foster Communication

- Create routine times to offer direction and support
- Embed DiSC style awareness and discuss methods for ongoing use
- Balance giving information with encouraging employees to find solutions

### Prioritize Development

- Give both recognition and feedback consistently and frequently
- Model your own development and normalize ongoing growth
- Consistently hold performance reviews and create growth plans

## Types of Performance Issues

What do we do when we set up our team for success and there are still performance issues? It is human nature to assume that **character** is to blame when someone does not perform the way we expect. We convince ourselves that it was their conscience intent or that they deliberately misled or misbehaved (**integrity**). This can erode trust in others. Instead, address performance by asking:

Is it a **COMPETENCE** issue?

### Capabilities

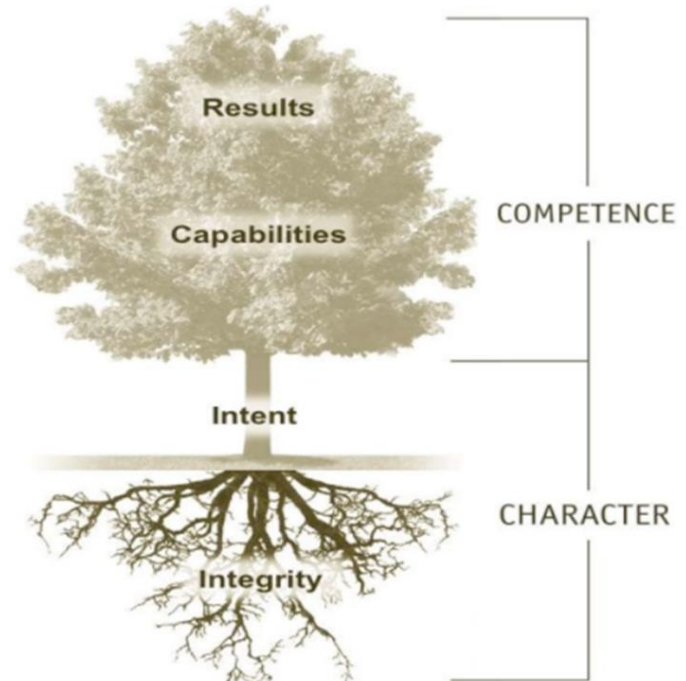
- Do they have the capabilities to perform the task?
- Are they able to use their strengths?
- Do they have the necessary knowledge or training?

### Results

- Did they understand and clarify expectations?
- Was the deadline defined?
- Are they making an effort to improve?

### Leader's Responsibility

- Was the task properly explained/delegated?
- Were adequate resources provided?
- Was the level of authority (Freedom Scale) given?



Source: The SPEED of TRUST  
by Stephen M. R. Covey

Is it a **CHARACTER** issue?

### What were their motives?

- Was the mistake or error intentional?
- Did they demonstrate respect?

### Integrity

- Are they being intentionally deceitful?
- Did they admit the mistake or make an effort to cover up or shift blame?
- Where are their loyalties?

## Identifying the Root of Performance Issues

When identifying the root of performance issues, START with competence (capabilities, responsibilities and follow-through) before questioning character (intent or integrity).



## Competence Issues

**Is it a Capability Issue?**

### Hiring:

- Are we hiring the right people for this role?
- What is the hiring process?
- Are expectations matching the employee's reality once they get in?

### Training:

- Does our training program set employees up for success?
- Are there ongoing training opportunities available to staff?
- Do we have a process set up to assess how well an employee is doing within each competency?

### Development:

- How are we developing our people?
- Do they have growth plans supporting their professional development?
- Are they able to use their strengths?



### Is it a Responsibility Issue?

#### Delegating:

- Do I just jump in and do the work even though I already delegated the work?
- Am I clear on expectations when delegating?
- Do I follow-up consistently on progress?
- Am I delegating to the right person (are they capable)?

#### Providing Access to Resources:

- Do they have access to resources needed in order to fully perform their job duties?

#### Authorization:

- Are they clear on their level of authority for what they are responsible for?
- Are the reporting relationships clear?

#### Self-initiation:

- Do they know their level of freedom?
- Do they know what they can self-initiate?

### Is it a Follow-Through Issue?

#### Requiring Results:

- Have standards and expectations been communicated clearly? How do I know they have?
- Are expectations aligned to job descriptions?

#### Rewarding Success:

- Do I recognize employees consistently?
- Is the recognition what the culture appreciates?

#### Mending Mistakes:

- Do I take the time to learn from mistakes?
- Do I come up with solutions to avoid the mistake in the future?

#### Negative Consequences:

- Do I respond appropriately when performance is falling short?
- Do I follow through on my word?



## Character Issues

### Is it an Intent Issue?

- What were their motives?
- Was the mistake or error intentional?
- Did they demonstrate respect?

### Is it an Integrity Issue?

- Are they being intentionally deceitful?
- Did they admit the mistake or try to cover up or shift blame?
- Where are their loyalties?



**Prompt:** Give an example when a character issue was not addressed.

What was the result?

What would you have done differently?

## Addressing Performance Issues

While some leaders make the mistake of jumping to character too quickly, others make the equally costly mistake of circling back to capability and responsibility. These leaders put the rest of the team at risk by not addressing the root issue.

For competence issues, solutions should focus on resourcing and training  
For character issues, solutions should focus on more formal action (i.e. PIPs)

### Leading Difficult Conversations

#### Prepare

- Write down the context (time, place, observed behavior) *\*See Communication Module's SBI model*
- Seek input from a third party to ensure your perspective of the situation is accurate
- Explore your motives and desired outcome for the conversation

#### Set the Stage

- Choose the appropriate time and location (i.e. in private when unrushed)
- Use a permission request such as "Is this a good time?"
- Emphasize that your intent is to help the individual, the team and/or the company

#### Share Your Side

- Describe the impact of their behavior in a specific and tangible way using "I" statements and how the behavior impacts the team or organization's goals *\*See Communication Module's SBI model*

#### Listen to Their Side

- Ask questions and practice active listening
- Listen for facts AND feelings. Focusing on both can improve mutual understanding
- Paraphrase back what you hear to check for accuracy of your understanding
- Encourage more information with open-ended questions - "How's that affecting you?"
- Redirect the conversation if it becomes defensive

#### Focus on a Solution

- Define the ideal future outcome and what you need the employee to do to achieve it
- Come to a consensus about what will happen. Document who will do what by when and determine how to follow up

# Notes

## Continued Learning: Accountability

Article: Accountability: Prerequisites Required by Scott Bieber, Masters of Public Administration  
FBI Training Division, Law Enforcement Bulletin

Book: The Speed of Trust: The One Thing That Changes Everything by Stephen M .R. Covey

Book: Crucial Conversations Tools for Talking When Stakes Are High by Kerry Patterson and  
Joseph Grenny

Online Resource: Collaboration White Papers <https://www.collaboration-llc.com/white-papers>

Article: How to Handle Difficult Conversations at Work by Rebecca Knight

Article: Do You Understand What Accountability Really Means? By Jonathan Raymond

Article: The Right Way to Hold People Accountable by Peter Bregman

Article: Accountability Examples: How to Use the 5 Cs Of Team Accountability in 2024 by Jessica  
Wishart

# Development



## Learning Outcomes

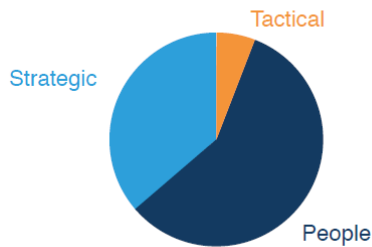
1. Understand common team dynamics and how to lead through them
2. Learn how to use talent mapping to identify and develop talent
3. Recognize the importance of development on an individual and team level
4. Improve ability to lead developmental conversations

# Prework

## 1) Review: Time by role

Leaders spend a significant time developing and managing their teams. How much time spent on relationships varies depending on your role and how many people you manage.

### Executives



### Supervisors



### Managers



#### People

*Examples:* Hiring, training, 1/1's, cross functional meetings, growth pathing

#### Tactical

*Examples:* Creating reports, reviewing delegated work, production, emails

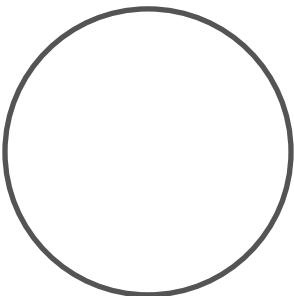
#### Strategic

*Examples:* Process improvement, innovation, vision-casting

## 2) Fill In: Over the last week, estimate how your time was spent in each of the three areas:

\_\_\_\_\_

\_\_\_\_\_



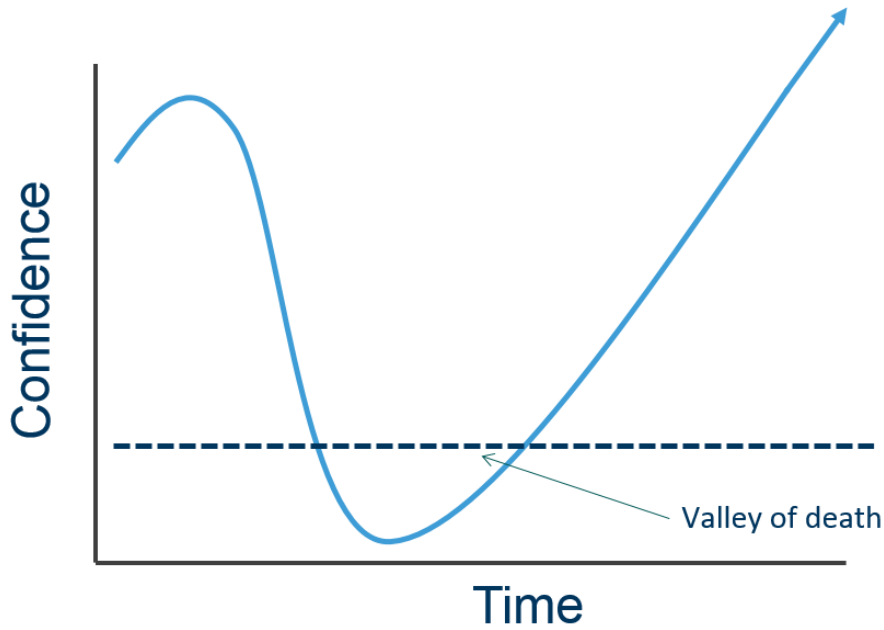
\_\_\_\_\_

## 3) Respond: Which areas would you like to spend more or less time?

# Development Norms

## New Positions

It is normal for individuals to go through a dip in confidence when they start a new position or role.



### Do

*Emphasize this is a normal process*

*Break learning into smaller chunks*

*Set short-term goals*

*Be there for support*

*View mistakes as learning opportunities*

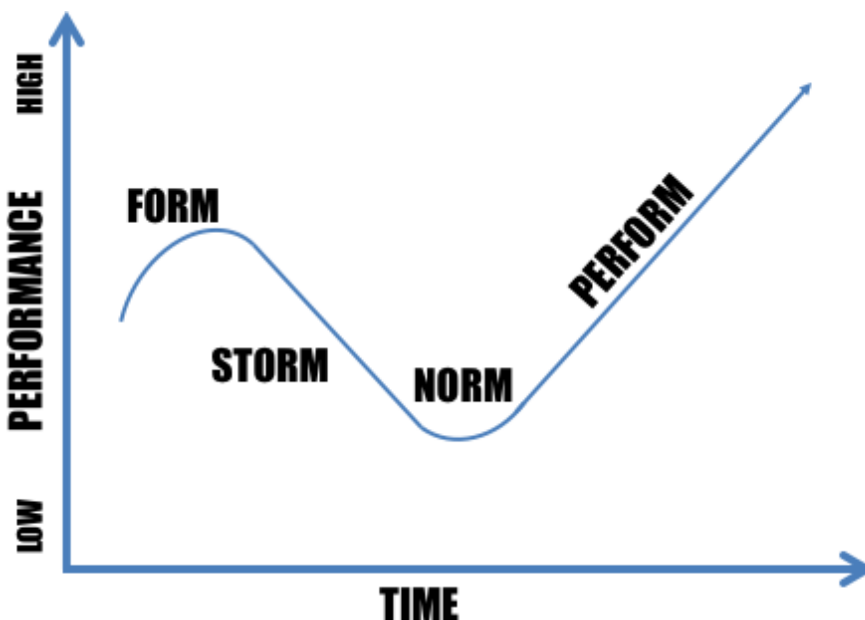
*Schedule routine one-on-ones*

### Don't

*Assume that it is a bad hire or poor role fit*

## Development Stages

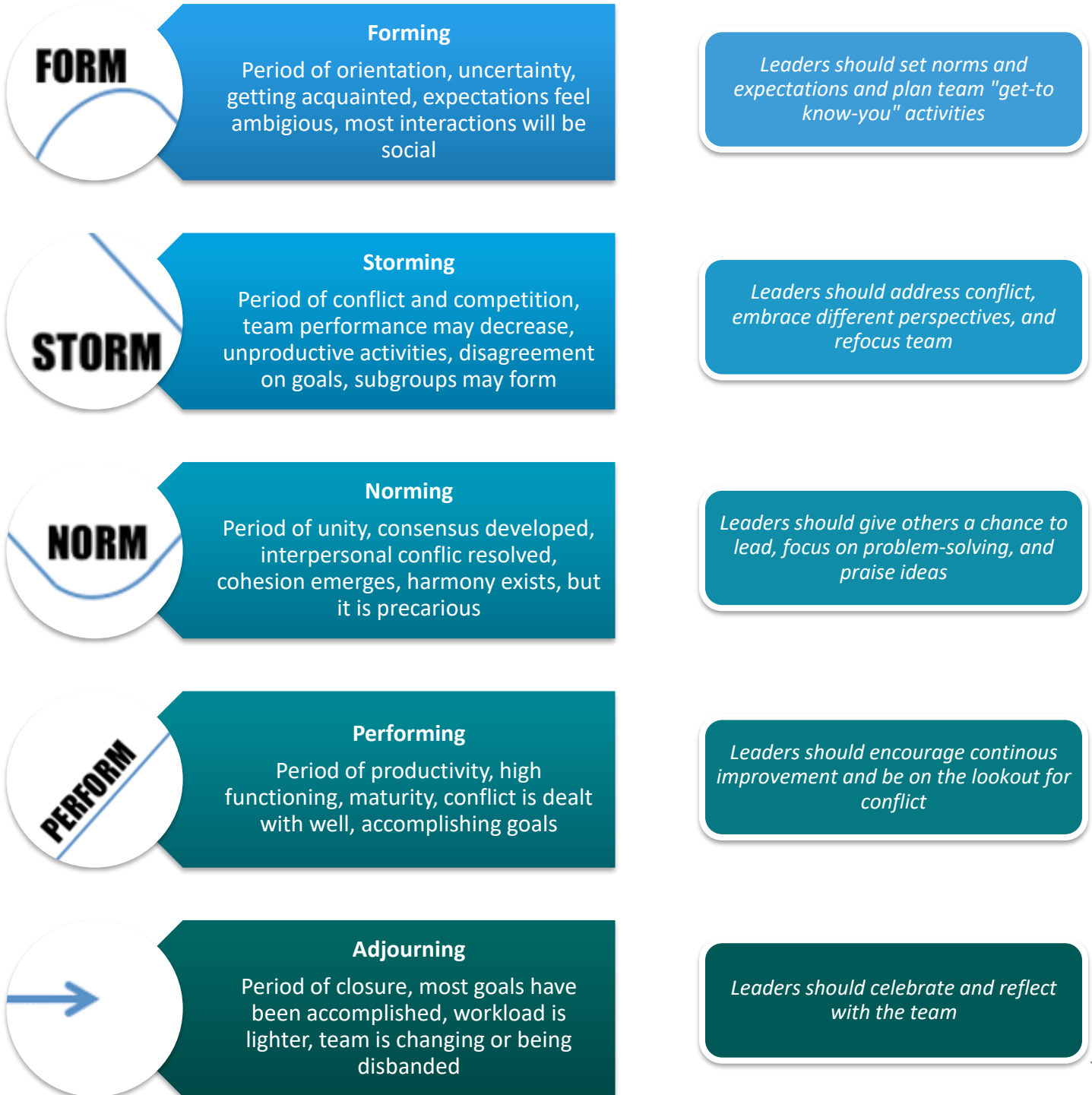
Teams follow a similar curve as individuals, and the following stages can happen when a team is originally created or when a team experiences changes, like adding a new member or taking on a new kind of project.



*Adapted from: Bruce Tuckman's Stages of Team Development*

# Tuckman's Stages of Team Development

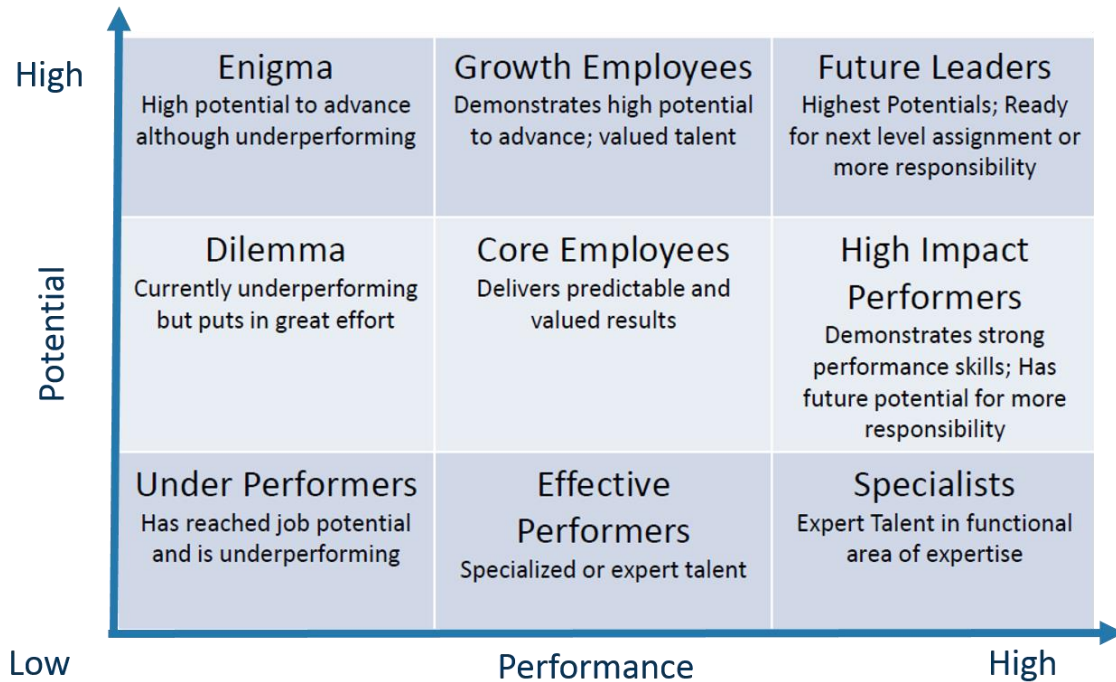
The model below outlines the normal stages teams go through. Each step builds on the previous one as they prepare to perform. Skipping any step will affect performing negatively. As a leader it is important to consider how to strategize and develop your team through each of these stages.



# Talent Mapping

## 9-Box Matrix

This tool evaluates both an employee’s current contribution to the organization and their potential level of contribution to the organization.



## Managing Each Type of Employee

### Poor Performers

**Enigmas:** Invest in training and development, set goals then assess growth

**Dilemmas:** High level of coaching needed, set goals then assess growth to discern long term fit

**Under Performers:** Reassign to lower level or manage out

### Moderate Performers

**Growth Employees:** Develop with stretch goals to reach performance potential

**Core Players:** Coach to develop management and strategic skills

**Effective Performers:** Develop into specialist with stretch goals

### High Performers

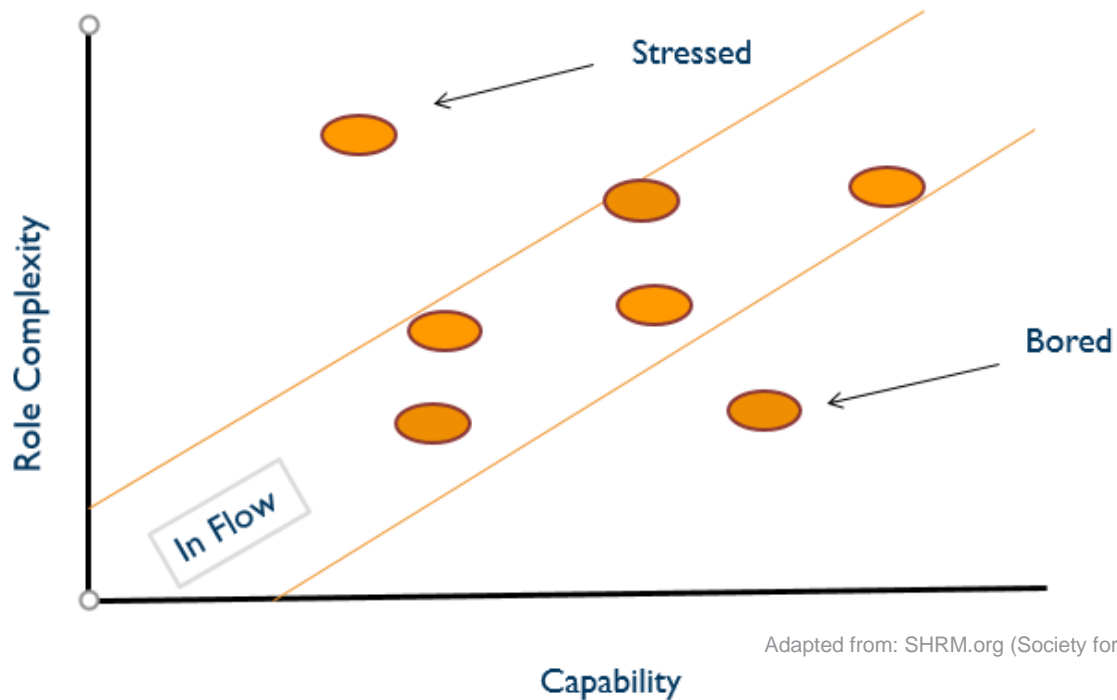
**Future Leaders:** Assign higher role/responsibility

**High Impact Performers:** Develop delegation, management and strategic skills

**Specialists:** Coach to support in current role, do not promote higher

## Complexity V. Capability

This graph shows role fit based on capability and current role complexity. The goal is to have people in flow where they can succeed in their role while progressively growing their skills.



### Supporting Flow

#### Employees who are Stressed

- Further train to support complex responsibilities
- Shift responsibilities to be less complex

#### Employees who are Bored

- Promote to higher role
- Increase challenge in current role

#### Employees who are In Flow

- Increase complexity to assess capacity
- Simplify responsibilities or challenge them as needed to keep them in flow

**Prompt:** What area do YOU currently fall into? Can you think of an employee that currently falls into each area?

## Employee Feedback

To effectively develop individuals and teams, it's important to create opportunities to hear *their* perspective on their role and goals for the future. These conversations can take place with new hires after initial onboarding, as part of annual reviews, or when challenges arise. Even if nothing groundbreaking comes up, the conversation will strengthen the relationship.

### Purpose

Ultimately, the goal is to check in with the employee and use the information shared to develop a plan, or improve a current plan, that makes the position a great fit for both the employee and the organization.

### Opening the Conversation

"I'd like to have an informal talk with you to find out how the job is going so I can do my best to support you as your manager, particularly with issues within my control and planning your professional development."

### Questions

You should have several open-ended questions on hand. It's important to listen and gather ideas from the employee even if they differ from your ideas or perspective.

- What do you look forward to when you come to work each day?
- What do you like least about working here?
- If you could change something about your job, what would that be?
- What would you like to learn here? What special projects pique your interest?
- What motivates you?
- What demotivates you?
- What talents are not being used in your current role?
- How do you like to be recognized?
- What can I do to best support you? Is there something I can do more of or less of as your manager?



### Closing the Conversation

To close the conversation, summarize the main ideas you discussed any plan any next conversations or steps that should be taken based on the conversation.

# Notes

## Continued Learning: Development

Book: Drive: The Surprising Truth About What Motivates by Daniel H. Pink

Book: First, Break All The Rules: What the World's Greatest Managers Do Differently by Jim Harter and Marcus Buckingham

Article: Why Effective Leaders Must Manage Up, Down and Sideways by Thomas Barta and Patrick Barwise

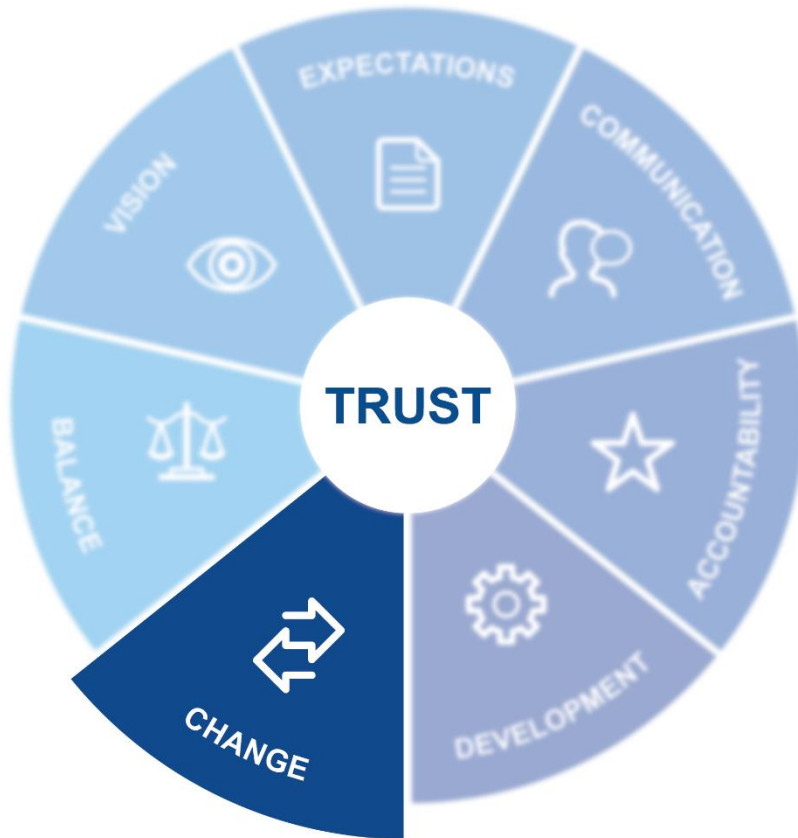
Article: *The New Science of Building Great Teams* by Alex "Sandy" Pentland

Article: *High-performing teams: A timeless leadership topic* by Scott Keller and Mary Meaney

Research Whitepaper: *The Formula for a Winning Company Culture*

Article: Bruce Tuckman's Forming, Storming, Norming & Performing Team Development Model by Carol Wilson

# Change



## Learning Outcomes

1. Understand the importance of planning for change
2. Improve ability to assess the impact of change
3. Recognize why successful change starts with an individual
4. Understand different reactions to change

# Prework

## 1) Review

Rather than seeing change as disruptive, think of it as something that can add value to your organization. If change is implemented well, it can improve the way work gets done and allow you to take advantage of opportunities.

*Change may look like:*

- Re-engineering a common process to solve a problem
- Adjusting onboarding procedures to streamline employee training
- Implementing a new software to enable a more mobile workforce

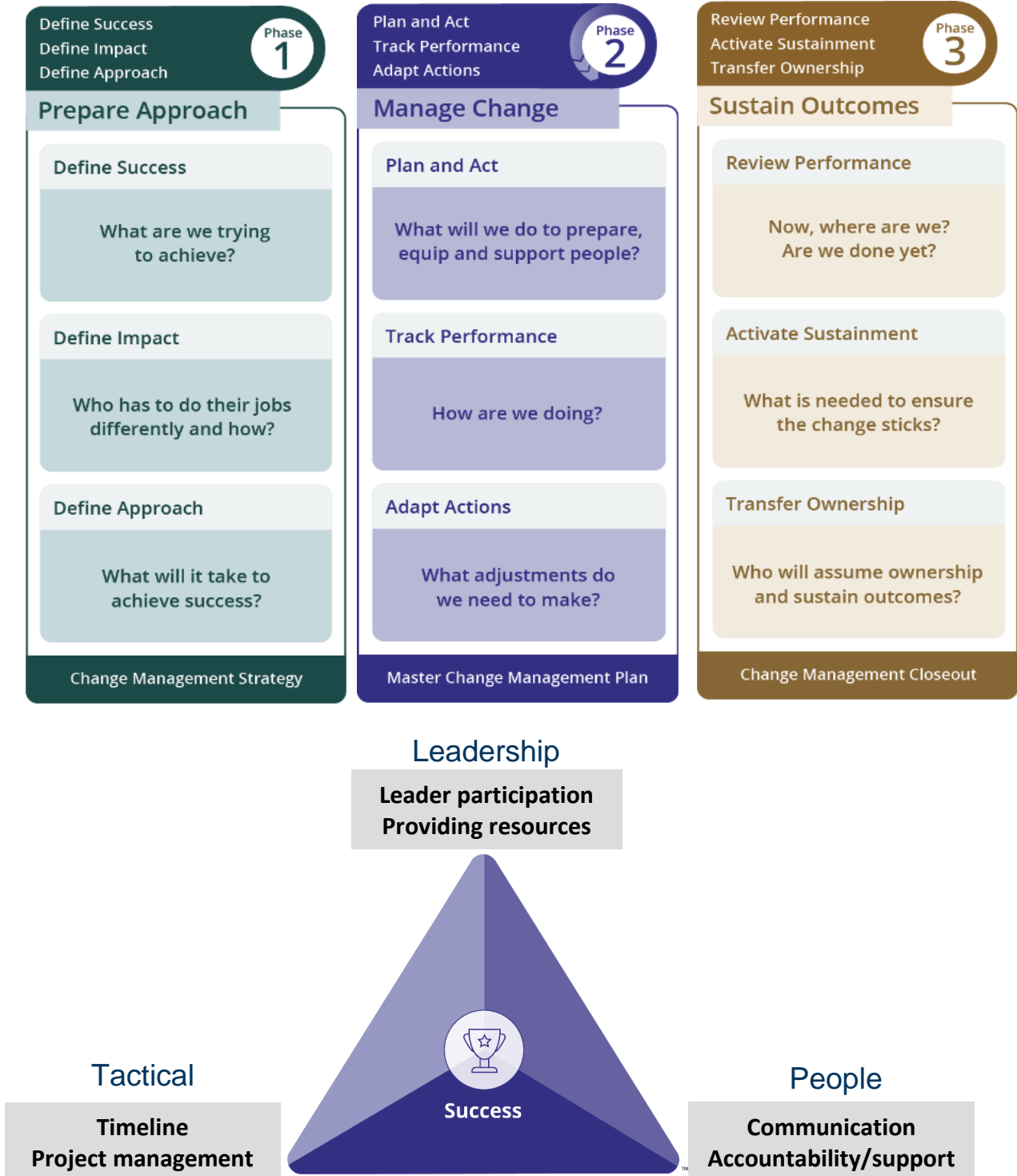


**2) What is a change your organization has experienced or is currently experiencing?**

**3) What has worked well? What hasn't worked well?**

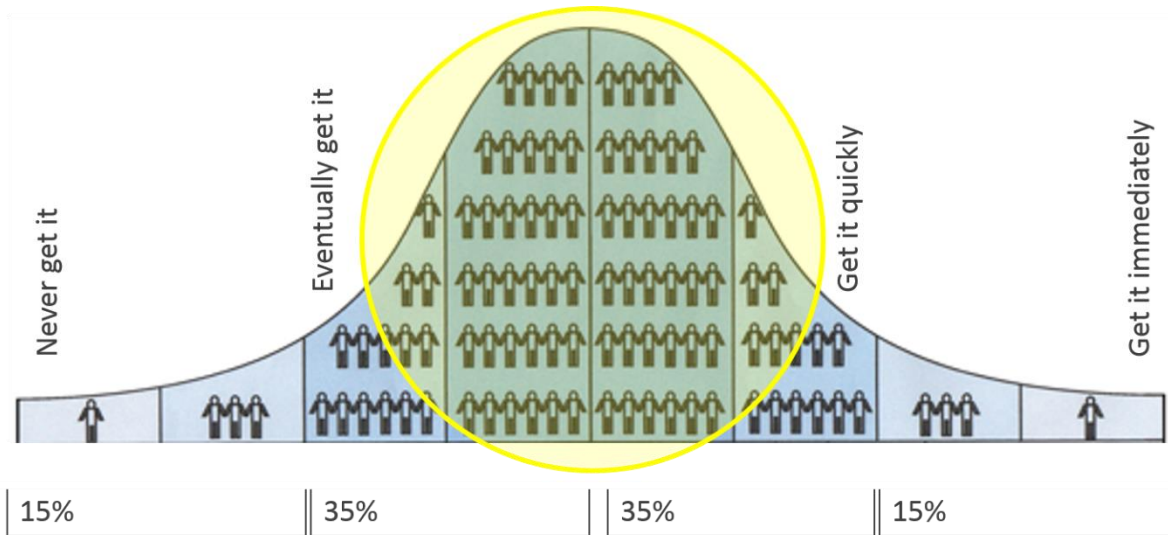
# Process of Change

The Prosci® 3-Phase Process is a structured yet flexible approach to support change in an organization. As leaders, it can be used as a simple framework to assess if you are asking the right questions and taking the necessary steps to support effective change.



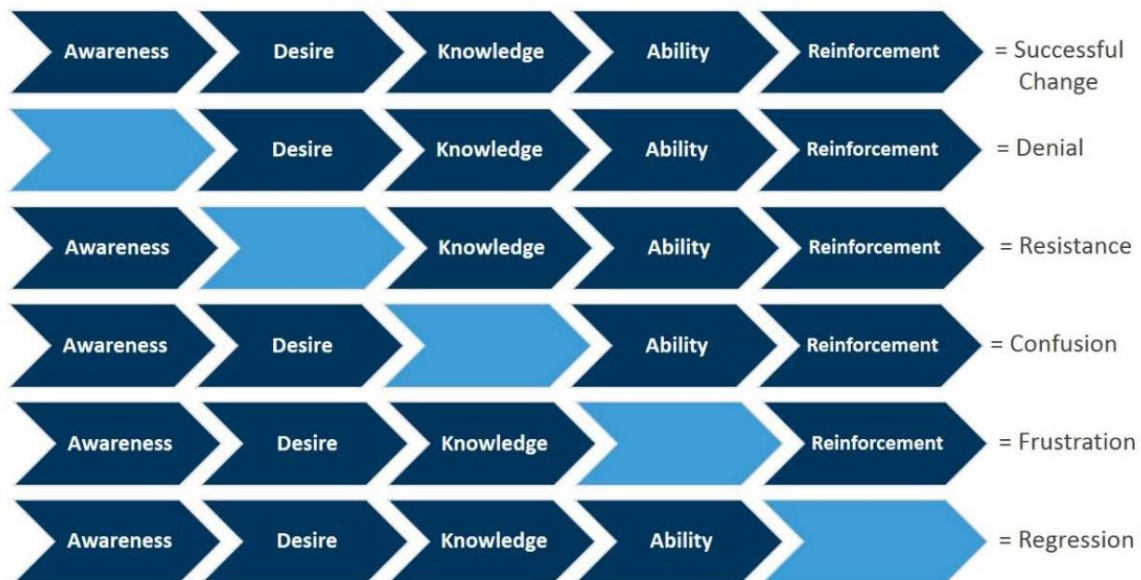
# People Side of Change

Don't let outliers drive decisions when implementing change. Focus on the middle majority to move the group forward.



## The ADKAR Model

The Prosci® ADKAR model presents five outcomes needed on the individual level for change to be successful. The chart below highlights the negative impact that would arise if a component is missed during change



Source: Prosci® Change Management

## Tips to Move Through ADKAR

### Create awareness of the need to change

- Avoid simple announcements; instead, create awareness for why the change is needed
- Create time and space to address questions and concerns and clarify the “why”

### Foster desire to make the change

- Present the change as something that will benefit employees in their day-to-day work lives, making connections directly to their experience
- When possible, tie the change to back to previous feedback from employees, framing the change as a solution to pre-existing concerns

### Provide knowledge on how to change

- Ensure your team understands how their responsibilities, skills, tools, and processes will be impacted
- Provide the training and education required to support employee success; train gradually if there is substantial skill development needed

### Ensure that employees are able to make the change

- Bridge the gap between knowledge and ability by putting change leaders in charge of coaching individuals or teams
- Allow your team to test the change before fully rolling it out to build confidence
- Collect employee feedback so they can bring potential obstacles to your attention

### Reinforce the change

- Celebrate success during and after the transformation so that you can build and maintain enthusiasm
- Listen to employees to identify pain points and see where extra support would be beneficial



## Individual Reactions to Change

It is VERY important to understand employees don't really resist change; they resist loss. They resist perceived lack of control change can bring. The four reactions to change include:



### Logical and Rational Resistance

Logical and rational resistance is an outcome of **disagreement with facts, reasoning and/or logic** associated with the change. Even though change may be beneficial for the employees in the long run, the short run costs for change must be paid first. Individuals who have **fact-based behavioral styles** may be more likely to exhibit logical and rational resistance.

#### What does this look like?

Place a check next to the reactions observed.

#### *Critic Mode*

- Questioning and challenging whether change is necessary and the feasibility of it
- Failing to see any positive outcomes from change
- Looking for reasons why change will not be successful
- Complaining rather than trying to make the change work
- Requiring extra time to adjust
- Engaging in blame, criticism or anger



#### What can I do as a leader?

Place a check next to the ideas you would like to try.

- When communicating the change be sure you understand
- Model solution focused thinking
- Encourage people to address their concerns and skepticism and seek suggestions
- Encourage them to put their energy into trying to make the change work
- Help individuals focus on 'What's in my control?' and 'What is out of my control?'
- Establish critical priorities, take something off their plate
- Help others understand that the 'truth' (i.e. what we know at this time) keeps changing

## Psychological and Emotional Resistance

These types of resistances are typically based on **emotion and attitude**. Employees may fear the unknown, mistrust management, or feel that their security or ego needs are threatened. Individuals who have **emotion-based behavioral styles** may be more likely to exhibit psychological or emotional resistance.

### What does this look like?

Place a check next to the reactions observed.

#### *Denial or Victim Mode*

- Not understanding why the change is necessary
- Not engaging or participating in discussions
- Undermining the change or actively sabotaging it
- Feeling angry or depressed
- Isolating oneself or failing to ask for help
- Fear of the unknown
- Dislike of management/change leader
- Need for security, status quo
- Lashing out



### What can I do as a leader?

Place a check next to the ideas you would like to try.

- Allow time for the change to sink in
- Provide information in as many forms as possible
- Anticipate needs for comfort, security and belonging
- Allow early venting, but don't allow people to stay stuck
- Encourage discussion and any kind of participation
- Help others understand that change is a constant in our personal and professional lives
- Don't show sympathy (pity), have empathy and help them work through it
- Don't tolerate sabotage; confront those who aren't going along with agreed working practices
- Make it difficult to return to the old way of doing things
- Communicate frequently; not knowing creates fear and anxiety

## Sociological Resistance

Sociological resistance happens when change is seen as a challenge to **group interests, norms and values**. Individuals participating in sociological resistance may form political coalitions or departmental factions.

### What does this look like?

Place a check next to the reactions observed.

#### *Group Mode*

- Formation of cliques
- False or assumed group leaders
- Desire to retain existing friendships
- Defending the group instead of thinking of the whole

#### *Bystander Mode*

- Acting reluctant to get involved
- Waiting for others to make decisions and take the lead
- Becoming preoccupied with other, increasingly trivial matters



### What can I do as a leader?

Place a check next to the ideas you would like to try.

- Re-recruit champions
- Include others in the process when possible
- Lead group discussions to be 2% problem and 98% solution focused
- Address conflict quickly and directly with all individuals involved
- Bring individuals/groups together to facilitate discussion
- Stay around positive people
- Don't wait to have the "right" answers before communicating the change or moving forward
- Model good stress management
- Don't take it personally

## Exploration & Commitment

Exploration and commitment happens when employees are **starting to look to the future**, and can effectively become champions and advocates for the change. They could, however, also be exploring alternatives (because they may retain some skepticism).

### What does this look like?

Place a check next to the reactions observed.

#### *Navigator Mode*

- Exploring the causes of or reasons behind the change
- Too many ideas or a feeling of too much to do
- A lack of focus, indecision and distraction
- Alternating between “exploration” and “resistance”
- Finding ways to be useful in implementing change
- Looking for opportunities for improvement
- Feeling hopeful they (as an individual) can make it in the new organization
- Receptive to problem solving



#### *Commitment Mode*

- Committed, but may not share consensus and may not agree with everything
- Convinced that the vision and strategy can be implemented
- Feels that success is possible
- They’re part of the team and willing to learn and contribute
- They put energy in to making things work or work better
- Helping other employees move through their change curves
- Looking for ways to help minimize impact
- Forming nurturing relationships with others affected by change

### What can I do as a leader?

- Place a check next to the ideas you would like to try.
- Channel energy into positive directions; don’t turn ideas down, (this could make an employee resort to “resistance”). Help them modify their ideas to better fit the change
  - Encourage and support brainstorming and strategy sessions
  - Provide positive feedback and acknowledge employees’ changing attitudes
  - Address employee indecisiveness, remaining fears and lack of focus
  - Provide training so that employees gain more knowledge and competence
  - Encourage committed employees by acknowledging their accomplishments and successes

Adapted From: Leading People Through the 4 Stages of Change by Joshua Brusse, Chief Architect, HP Software Professional Services  
 Navigating Through Change by Gayle Hardie, Global Leadership Foundation

# Notes

## Continued Learning: Change

Book: Leading Change by John P. Kotter

Book: Hiatt, J. ADKAR: A model for change in business, government and our community, Learning Center Publications.

Online Resource: Prosci Change Management <https://www.prosci.com/change-management>

Book: Essentialism: The Disciplined Pursuit of Less by Greg McKeown

Article: *The people power of transformations* taken from McKinsey & Company survey results

Article: *Continuous improvement—make good management every leader’s daily habit* by Andy Eichfeld, David Golding, David Hamilton, and Kathy Robinson

Article: *Leadership and Innovation* by Joanna Barsh, Marla M. Capozzi, and Jonathan Davidson

# Balance



## Learning Outcomes

1. Evaluate stress management skills
2. Determine opportunities to improve priority management skills
3. Learn how to build effective habits
4. Improve ability to navigate the modern workplace

# Prework

## Priority Management Skills Assessment

Think about how well you manage your priorities by responding to the following statements. Answer the questions as you actually are, rather than how you think you should be.

**Rate yourself from 1-5** (1: Not at all 2: Rarely 3: Sometimes 4: Often 5: Very Often)

### *Prioritization*

- The tasks I work on are the ones with the highest priority.
- I know whether the tasks I am working on are high, medium or low value.
- I confirm my priorities with my boss.
- When given a new assignment, I analyze its importance and prioritize it accordingly.

### *Goal Setting*

- I use goal setting to decide what tasks and activities I should work on.
- I organize my To-Do List or Action Program based on set goals.

### *Planning/Scheduling*

- I set aside time for planning and scheduling.
- I know how much time I spend on each of the various tasks I do.
- Before I take on a task, I check that the results will be worth the time put in.
- I leave contingency time in my schedule to deal with the unexpected.

**Total Score:** \_\_\_\_\_

**(36-50)** You're managing your priorities very effectively!

**(21-35)** You're good at some things, but there's room for improvement elsewhere.

**(10-20)** You need to fundamentally improve your priority management skills.

### **Common Signs of Ineffective Priority Management**

- Completing tasks at the last minute or asking for extensions
- Dealing with a lot of interruptions
- Consistent stress about deadlines and commitments
- Continuously working long days to get work done
- General distractions preventing progress on critical tasks (phone, conversations, etc.)

# Managing Your Time & Priorities

At the root of managing your time well is the ability to manage your priorities. Understanding the urgency and importance of different tasks is a simple filter to help prioritize what you need to get done.



*Time management is an oxymoron. Time is beyond our control, and the clock keeps ticking regardless of how we lead our lives. Priority management is the answer to maximizing the time we have.*

- John C. Maxwell

# Building Effective Habits

## Habit Formation

Effectively getting work done requires both competence in the task at hand and the ability to manage your own productivity well, which is dependent on your work habits. To create new habits, identify cues to trigger desired behaviors, establish consistent routines, and reinforce the actions.

### Cues

Consistent work rituals help cue your mind that it's time to transition into a specific workflow. When done consistently, they lessen the work it takes for your brain to make the transition.

#### Potential Cues

- Get coffee right before sitting down at your desk in the morning
- Walk the hall before each management meeting
- Organize your desk papers right after lunch before jumping back into work

### Routines

The routine is the desired behavior you want to turn into a habit. Some productivity enhancing routines include:

#### Time Blocking

Allocate specific time slots for different tasks to minimize distractions and enhance productivity. For example:

- Spend the first 30 minutes of each day on one specific task (i.e. priority planning)
- Set timers in 15-30 minute increments and give all your attention to the task at hand until the timer ends

#### Intentional Breaks

Powering through your day without breaks is more likely to decrease your productivity than increase it. To take breaks effectively:

- Incorporate short breaks every hour (i.e. standing, stretching, walking to get water)
- Prioritize full separation from work tasks during breaks, even if it's only turning a different direction at your desk or walking outside for a minute

### Reinforcement

You will naturally experience some intrinsic rewards when making habits, but engaging in extrinsic rewards will help further reinforce them. Some simple rewards could include:

- Put a coin in a jar every time you do the habit towards your favorite meal
- Get a treat (coffee, dessert, drink)
- Go for a walk

# Managing Stress

This instrument is designed to help you discover your level of competency in stress management so you can tailor your learning to your specific needs. Please respond to each statement by writing a number from the rating scale provided.

## Rate yourself from 1-6

1: Strongly Disagree 2: Disagree 3: Slightly Disagree 4: Slightly Agree 5: Agree 6: Strongly Agree

### When faced with stressful or time-pressured situations:

1. \_\_\_ I use effective priority-management methods such as to-do lists.
2. \_\_\_ I maintain a program of regular exercise for fitness.
3. \_\_\_ I maintain an open, trusting relationship with someone who I can share frustrations to.
4. \_\_\_ I know and practice several relaxation techniques (i.e. deep breathing)
5. \_\_\_ I frequently assess my priorities so less important things don't monopolize my time.
6. \_\_\_ I maintain balance in my life by pursuing a variety of interests outside of work.
7. \_\_\_ I have a close relationship with someone who serves as my mentor or advisor.
8. \_\_\_ I effectively utilize others in accomplishing work assignments.
9. \_\_\_ I encourage recommending solutions (not just questions) when presenting issues.
10. \_\_\_ I strive to redefine problems as opportunities for improvement.

### **Eliminating Stressors:** Add up 1, 5, 8 & 9: \_\_\_\_\_

- 16-24: Has the skills to effectively mitigate or eliminate stress
- 4-15: Likely struggles to mitigate or eliminate stress; opportunity to develop priority management, delegation and collaboration skills

### **Developing Resilience:** Add up 2, 3, 6 & 7: \_\_\_\_\_

- 16-24: Regularly engages with activities and relationships that build resiliency to stress
- 4-15: Likely finds it difficult to persevere through stress; opportunity to develop lifestyle stress management routines and relationships that provide mentorship and support

### **Short Term Coping:** Add up 4 & 10: \_\_\_\_\_

- 8-12: Is able to reframe stressful situations and implement immediate stress management techniques as challenges arise
- 2-7: Likely finds it overwhelming when stressful situations arise and struggles to deescalate; opportunity to develop relaxation techniques and reframing skills

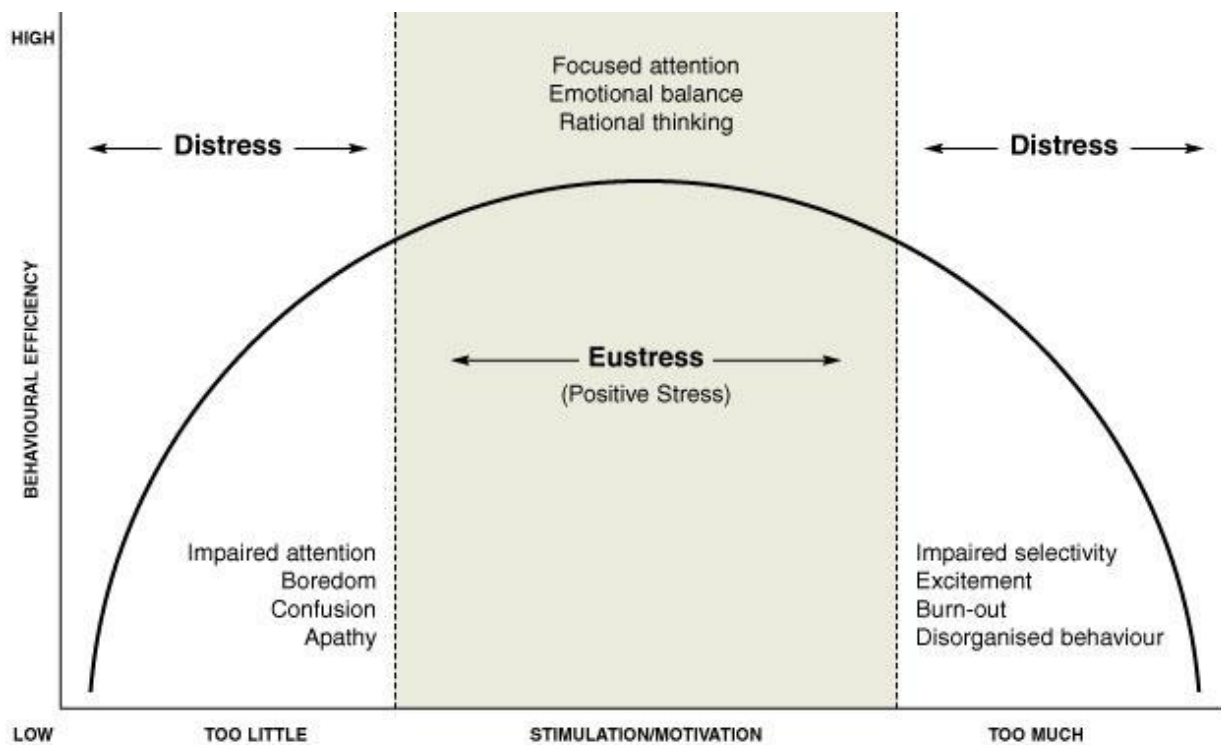
## Not All Stress is Bad

Stress is not always negative. There are two types of stress: eustress and distress. Eustress is the kind of stress that motivates us, focuses energy, keeps us productive and can improve performance. Distress, on the other hand, refers to the negative aspects of stress, as an ongoing sense of anxiety from which there is seldom relief.

As a leader, it is important to accept that a certain amount of stress is normal and even beneficial for productivity. However, be mindful of yourself and your team to ensure that the stress does not escalate to prolonged distress.

### Remember

Both personal life and work life contribute to stress levels. Good leaders account for stress *outside* of the workplace and develop relationships with employees where they can discuss those factors.



## Reframing Stress

In her book, *The Upside of Stress*, Kelly McGonigal explains that a better way to view stress is as an asset to be used, not a condition to be avoided. Try to reframe stress as something that:

- Enhances performance and productivity
- Facilitates learning and growth
- Creates energy that can be channeled into motivation

# Navigate the Modern Workplace

The workplace is continually evolving, and it can be challenging to know the best way to navigate new norms, both as a leader and as an employee. The following are key areas to focus on to help promote an effective workplace.

## Multigenerational Workforce

### As an employee:

- Recognize that your definition of an effective work culture/expectations may differ from others (i.e. work hours)
- Practice respect for all team members, avoiding generalizations and assumptions
- Reframe differences in perspective as opportunities to learn from one another

### As a leader:

- Invest in ongoing learning and continued development for all ages of your workforce
- Offer flexibility to support workers' personal needs (caring for children, caring for elderly parents, etc.)
- Educate your team on experiences common to multigenerational workplaces and normalize conversations about the best way to work together

## Hybrid Work Environment

### As an employee:

- Establish routines and environment changes to separate time “at work” and time off
- Make sure you collaborate with your supervisor to set communication expectations and offer the same flexibility you request
- Expect the need for extra communication to build relationships

### As a leader:

- Make an effort to connect with hybrid and remote workers, both 1/1 and as a team
- Focus on outcomes and allow team members to approach success differently
- Pay for the technology for dedicated home offices for remote workers

## Technology/AI

### As an employee:

- Communicate your comfortability and skill level with technology
- Be willing to learn the technology necessary to thrive in your role
- Share input with your supervisor about opportunities to improve software

### As a leader:

- Understand no software is perfect; focus on implementation and ongoing training
- Recognize the rapidly-evolving nature of technology and routinely reassess changes
- Educate yourself on the impact of AI in your industry and ways to leverage it

# Notes

## Continued Learning: Balance

Book: Essentialism: The Disciplined Pursuit of Less by Greg McKeown

Book: The Upside of Stress by Kelly McGonigal

Book: Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones by James Clear

Article: What to Do If Calls, Texts, and Coworker Drop-bys Are Stressing You Out by Elizabeth Grace Saunders

Article: Organizing for the age of urgency by Aaron De Smet and Chris Gagnon

Article: Before You Set New Goals, Think About What You're Going to Stop Doing by Elizabeth Grace Saunders

Article: The Anatomy of a Habit: Cue, Routine, and Reward by Mwewa, M.